Guide to Balancing Customers’ Expectations with Operational Realities
Agenda

- Understanding customer expectations
- Reducing customer frustration
- Operational realities
- How to meet your customer expectations
- Visually see the tracked, true customer journey
- CX Checklist
Customers’ demand for higher-end personal experiences force companies to determine which levels of customized care to provide...
58% of customers never return after a bad CX.

Just 46% of dissatisfied customers tell you about a bad experience.

Companies with strong omni-channel CX strategies retain 89% of customers.
1. Leverage the **digital transformation** to explore what customers are actually doing, visiting, and considering and where they are hitting a dead-end or exiting an online process.

2. Develop a comprehensive **customer journey map** to pinpoint where customers reach a bottlenecking point to offer the most effective mix of customer care actions.

3. Use **customer journey tracking** to monitor and measure what the CX truly is.
1. **Not enough operational flexibility**
   - Is your premise contact center providing enough flexibility to maximize your investments in human and technological capital?

2. **High cost, low return**
   - Many companies consider digital automation to be the answer; “bots” and virtual assistants can serve as gatekeepers for important channels including chat, voice, and IVR.

3. **Lack of good data**
   - A common challenge is to fully integrate your CRM so it’s easily accessible by not only your agents, but other departments within your business.

4. **Long hold times**
   - The number one frustration customers experience is long hold times.

5. **Disconnect between your customers and agents**
   - Your customers can be literally anywhere and on any channel; have the tools you supply your agents kept up?
An Intuitive Customer Journey with Waypoints

Your customer, Travis, receives an email letting him know that his latest bill is available to view online.

He follows the instructions, resetting his password. Waypoint Reached

Travis clicks the link from the email, which opens in the brand app, but is having trouble remembering his password and cannot log in. Waypoint Missed

Instructions for resetting the password are pushed through to the app.

He ignores the instructions and continues to try incorrect passwords. Waypoint Missed

Travis is sent an email, letting him know there’s been multiple attempts to log in, and provides a link to reset his password.

He views bill. Everything looks great, and he logs back out.

Recognizing that Travis is likely to engage with emails, he is sent an additional email with upsell opportunities.

Travis clicks the link from the email and successfully logs in. Waypoint Reached

He clicks a button on the page, requesting a callback.

Agent calls, “Hello, Travis. Let’s look into your recent payment.”

Payment is re-submitted and is now showing up. Issue is resolved. Waypoint Reached

Travis views his bill and sees that the payment he submitted has not gone through.

Travis is sent a survey about his experience via SMS.
10:33:49 AM NOVEMBER 1, 2017

AGENT ACCEPTED CALL

- Incoming call from IVR
- Continuation of Customer Journey to Purchase Product
- Started on Web, moved to Chat, now moved to voice
CX Checklist

Key Steps to Ensure You Are on the Right Path to Delivering the Best Customer Experience
✓ **Work Across Channels**
  – The right place to be is *where your customers are*. That means a customer service center capable of handling messages, live chat, and email as easily as a voice call. And that listens in on social media, too.

✓ **Know Where the Touchpoints Are**
  – Some interactions matter more than others. These *Waypoints* – customer situations where major decisions are made, and where the risk of losing a customer is higher – are key to the entire experience, because customers remember them a lot longer when they go wrong.

✓ **Leverage Your Infrastructure**
  – In many CX scenarios, there’s no need to rip-and-replace - so don’t do it. Instead, look to overlay your existing infrastructure with an intelligent solution that joins them together to keep them performing.

✓ **Smooth Out the Silos**
  – Sometimes solving their problem might need input from different departments - if so, make it as painless as possible, and aim for first contact resolution as the ideal.
✓ Track Not Corral
   – In this omni-channel environment, there are as many customer journeys as customers. Let them choose their preferred path across it, and engage when they need help, not just when you want to push them along.

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✓ Answer the Unspoken
   – Many customer questions are never verbalized. Think about the abandoned process, the repeat visits, all the actions that signal customer frustration.
✓ **Empower Your Agents**
  – Service agents often know precisely how to help a troubled customer – but lack the tools to deliver the most positive experience. Make sure your trained people have the authority to match their enthusiasm.

✓ **Collect the Right Metrics**
  – Most metrics are about counting the customers you reach. Instead, **reach the customers who count**, with metrics that mirror a great customer experience rather than those that measure arbitrary figures in your workload. Customer satisfaction is the goal.

✓ **Work to Rules**
  – The best CX solutions don’t just react to situations as they emerge; they let you apply business rules to formalize what happens ahead of time.

✓ **Learn from the Past**
  – Every customer is different - but the Waypoints where actions are taken are common to many. Collecting behavioral data from hundreds or thousands of situations can inform and improve your entire CX, by using past data to predict a positive pathway out of each situation. Proactive beats reactive.
THANK YOU.

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